



OFFICE OF INFORMATION SERVICES

DATE: July 14, 2006

TO: All Medicare Advantage, Prescription Drug Plan, Cost, PACE, and
Demonstration Organizations Systems Staff

FROM: Henry Chao /s/
MA/Part D Implementation Manager

SUBJECT: Announcement of Plan User Interface Updates

CMS continues to work toward streamlining and improving Plan user access to beneficiary data required to administer MMA contracts. As of July 17, 2006, CMS will begin a phased-in implementation of new and revised screens that combines beneficiary information from the separate MARx and MBD User Interfaces, into a single user interface, the MARx UI. It is important to note that with these changes, all data that is currently available to the Plans will remain available. The single UI will provide the Plans with a consistent view of beneficiary eligibility and enrollment data.

As of July 17, Plans will begin to see the new MARx screens; on or about August 1, 2006, the MBD UI will be eliminated.

A new screen, Beneficiaries Eligibility - M232, has been added to display Eligibility and LIS information. Initially, Plan users will only be able to view data for beneficiaries currently enrolled in their Plan; however with a subsequent update to the MARx UI, additional functionality will be implemented to provide the user with the ability to view the most recent entitlement and LIS information for beneficiaries not currently enrolled in their Plan.

Finally, from a batch processing perspective, CMS is implementing two new screens that allow the Plans to view the current status of their enrollment file submission. Users will be able to determine if their file has been received and processed by CMS, the number of transactions on the file, and the results of the processing.

The following screenshots and descriptions introduce Plans to these new features available on July 17.

- 1) **Beneficiary Detail: Snapshot (M203)**
- 2) **Beneficiary Detail: Status (M205)**
- 3) **Beneficiaries: Eligibility (M232)**
- 4) **Transactions: Batch Status (M307)**
- 5) **Batch File Details (M314)**

1. Beneficiary Detail: Snapshot (M203)

This screen displays the current address information in the header and the State and County Code (SCC) information in the body. Plans will now have the ability to view the SCC along with various other items "As Of" the date displayed on the screen.

| Claim #:997199598A 1125 LAUGHING SNAIL LN KOKOMO, IN 46902-3803 | | LISA D. JOHANNSON | | DOB: 04/16/1911 | |
|---|----------|---------------------|---------------------------------------|-------------------------------------|--|
| | | Age: 95 Sex: FEMALE | | State: IN (15) County: HOWARD (330) | |
| Snapshot Enrollment Status Payments Adjustments Premiums History Transactions Factors | | | | | |
| Beneficiary Detail:Snapshot (M203) User: XXXX Role: REGIONAL OFFICE USER Date: 10/15/2006 Close Change... Print Help... | | | | | |
| Change date to re-display Beneficiary Details and click "Find." | | | | | |
| As Of: <input type="text" value="10/15/2006"/> Find | | | | | |
| Contract: H6666 | | | Contract: S1234 | | |
| MCO Name: TRI-STAR INSURANCE | | | MCO Name: HOWARD HEALTH, INC. | | |
| PBP Number: A01 | | | PBP Number: B01 | | |
| Segment Number: 123 | | | Segment Number: 000 | | |
| Special Needs Type: | | | Special Needs Type: | | |
| Bonus Payment Portion Percent: 0% | | | Bonus Payment Portion Percent: 0% | | |
| Demographic Blend Portion Percent: 70% | | | Demographic Blend Portion Percent: 0% | | |
| Residency Status: Out of Area | | | Residency Status: In Area | | |
| SCC: State: IN (15) County: HOWARD (330) | | | | | |
| Status Flags: <input type="checkbox"/> Hospice <input type="checkbox"/> ESRD <input type="checkbox"/> Working Aged <input type="checkbox"/> Inst <input type="checkbox"/> NHC <input type="checkbox"/> Medicaid | | | | | |
| Payment Flags: <input type="checkbox"/> Disabled <input type="checkbox"/> CHF <input type="checkbox"/> Part B Premium Reduction <input checked="" type="checkbox"/> Long Term Institutional | | | | | |
| Low Income Subsidy: Subsidy Start: 01/01/2006 Subsidy End: 12/31/2006 LI Premium Subsidy Level: 100.00% | | | | | |
| LI Co-payment Level: 1 | | | | | |
| Original Reason for Entitlement: 1 | | | | | |
| Payments For Payment Date 10/2006 | | | | | |
| Rate Used | Part A | Part B | Part D | Total | |
| DEMOGRAPHIC | \$358.20 | \$244.65 | \$0.00 | \$602.85 | |

2. Beneficiary Detail: Status (M205)

This screen will include a separate section for Enrollment Periods and Status Periods; five additional statuses: ESRD Dialysis, ESRD Transplant, MSP, Plan Medicaid, and Third Party Medicaid info (state buy-in agency). The Start and End dates (wherever applicable) of both periods will be supplied. Several of the statuses have links for additional information. Additional detail information will be added in future releases.

| Claim #:997199598A | | | LISA D. JOHANNSON | | | | DOB: 04/1 | |
|--|-----|---------|---------------------------------------|------------|------------------|------------|---|--|
| 1125 LAUGHING SNAIL LN | | | | | | | Age: 95 Sex: FE | |
| KOKOMO, IN 46902-3803 | | | | | | | State: IN (15) County: HOWA | |
| Snapshot Enrollment Status Payments Adjustments Premiums History Transactions Factors | | | | | | | | |
| Beneficiary Detail:Status (M205) | | | User: XXXX Role: REGIONAL OFFICE USER | | Date: 11/15/2006 | | Close Change... Print | |
| | | | Enrollment Period | | Status Period | | | |
| Contract | PBP | Segment | Start Date | End Date | Start Date | End Date | Status | |
| S5670 | 132 | 000 | 01/01/2006 | | 01/01/2006 | 03/31/2006 | Hospice | |
| S5670 | 132 | 000 | 01/01/2006 | | 01/01/2006 | | ESRD | |
| S5670 | 132 | 000 | 01/01/2006 | | 01/01/2006 | | ESRD Dialysis | |
| S5670 | 132 | 000 | 01/01/2006 | | 01/01/2006 | | ESRD Transplant | |
| S5670 | 132 | 000 | 01/01/2006 | | 01/01/2006 | | MSP | |
| S5670 | 132 | 000 | 01/01/2006 | | 03/01/2006 | | Plan Medicaid | |
| S5670 | 132 | 000 | 01/01/2006 | | 03/01/2006 | | Third Party Medicaid | |
| S5670 | 132 | 000 | 01/01/2006 | | 04/01/2006 | 04/30/2006 | Institutional | |
| H5435 | 002 | 000 | 01/01/2005 | 12/31/2005 | 03/01/2005 | 03/31/2005 | NHC | |
| H5435 | 002 | 000 | 01/01/2005 | 12/31/2005 | 04/01/2005 | | Working Aged | |

3. Beneficiaries: Eligibility (M232)

This screen allows Plans to view the most recent entitlement and LIS data along with historical information for beneficiaries currently enrolled in their Plan. With the current release, if the beneficiary is not in the Plan, a “Beneficiary Not Found” message will be displayed.

In a future software update, new functionality will be added so that Plan user will be able to view the most recent entitlement and LIS information for beneficiaries that are not currently enrolled in the Plan.

CMS

Medicare Advantage Prescription Drug (MARx)
Welcome | **Beneficiaries** | Transactions | Payments | Rates | Reports | Maintenance
Find | Groups | New Enrollment | **Eligibility**

Beneficiaries: Eligibility (M232) User: XXXX Role: CMS CENTRAL OFFICE USER Date: 10/16/2006 [Print](#) [Help...](#)

Enter the claim number of the beneficiary.
*Indicates required field

*Claim #

Claim Number: 999123456D
Name: LOUISE M. JONES
Birth Date: 06/26/1938
Date of Death:
Sex: FEMALE
Address: 44 LAKESIDE DR
RIVERHEAD, NY 11901-1864
Employer Subsidy: Y

| Entitlement Information | | | |
|-------------------------|------------|-----|--------|
| Part | Start | End | Option |
| A | 03/01/1995 | | E |
| B | 04/01/1996 | | Y |
| D | 04/01/1996 | | N/A |

| Low Income Status | | | |
|--------------------|------------------|-----------------------|------------------|
| Subsidy Start Date | Subsidy End Date | Premium Subsidy Level | Co-Payment Level |
| 09/01/2006 | | 25% | 4 |
| 01/01/2006 | 05/31/2006 | 50% | 3 |

4. Transaction Processing: Batch Status (M307)

Plans will be able to view the processing status of their individual batch transaction files online. Users will enter a date range to display all enrollment files received during the selected timeframe along with the date of receipt and the date of processing of the file. Using the batch id from the Batch Status screen (M307), users can link to a Batch File Details screen (M314) for additional information.

CMS

Medicare Advantage Prescription Drug (MARx)

Welcome | Beneficiaries | **Transactions** | Payments | Rates | Reports | Maintenance | System

Find | **Batch Status** | On Hold | Rejected

Transactions: Batch Status (M307) User: XXXX Role: CMS CENTRAL OFFICE USER Date: 6/19/2006 [Print](#)

Enter search criteria and click "Find".

*Indicates required field

*From Date *To Date

06/01/2006 06/19/2006

[Find](#)

Click on the Batch ID link to view the transaction counts.

Batch Results 1-20(of 24) Go to Page: 1 [Go](#) [<<](#) [<](#) [>](#) [>>](#)

| Batch ID | User ID | File Received | File Processed | Batch Completion Summary Report Run |
|--------------------------|---------|---------------------|---------------------|-------------------------------------|
| 17901711 | XXXX | 06/01/2006 10:50:39 | 06/01/2006 10:50:57 | 06/01/2006 19:10:54 |
| 17901720 | XXXX | 06/01/2006 12:11:37 | 06/01/2006 12:18:42 | 06/01/2006 19:12:02 |
| 17901745 | XXXX | 06/01/2006 13:36:37 | 06/01/2006 13:55:42 | 06/01/2006 19:13:15 |

5. Transaction Processing: Batch File Details (M314)

The Batch File Details screen (M314) gives Plans access to information specific to the contents and status of each file submitted. Some of the information that will be displayed includes:

- 1) The batch file status message area, where Plans can see the current status of processing for the file: a) transaction file was received, b) transaction file was received but has not yet been processed, c) file processing on hold, d) processing stopped, e) file was successfully processed.
- 2) A snapshot of the numbers and types of transactions received, which Plans can use to verify what has been received by CMS versus what they sent in their file.
- 3) The batch completion summary section where Plans can see a summary of the counts of successful, rejected and failed transactions for the file.

CMS

Medicare Advantage Prescription Drug (MARx)

Batch File Details (M314)

User: XXXX Role: CMS CENTRAL OFFICE USER Date: 6/19/2006

Close

Print

Batch File Status Message

FILE WAS SUCCESSFULLY PROCESSED

| Transactions Received | | | | | |
|-----------------------|---------------|------------|-------------|------------|---------|
| Enrollment | Disenrollment | PBP Change | Plan Change | Correction | Unknown |
| 121 | 51 | 71 | 34 | 2 | 1 |

| Batch Completion Summary | | | |
|--------------------------|----------|---------|--------|
| Accepted | Rejected | Pending | Failed |
| 273 | 6 | 0 | 1 |

Please direct questions or concerns to the MMAHelp Desk at 1-800-927-8069 or via email to mmahelp@cms.hhs.gov.